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ABSTRACT

The participant's manual contains training materials for a national conference on mobilizing resources and fund raising in agencies concerned with promoting independent living for people with disabilities. Preliminary materials include the conference agenda, background information about the trainers, organizational information on Independent Living Research Utilization and the National Council on Independent Living, and a list of the conference's learning objectives. The next section focuses on elements of a fund-raising plan and explains the various sections of such a plan such as the case statement to present to donors, organizational development, funding history, funding opportunities, funding strategy, and how to structure the fund raising strategy. The bulk of the document consists of the visuals for a PowerPoint presentation titled "Mobilizing Resources for Independent Living Centers". These materials address the following aspects: funding trends across America; raising money from national organizations; advantages and disadvantages of funding; tips on raising money; writing winning proposals; strategic marketing; corporate sponsorships and partnerships; the corporate partnership approach to the corporation; religious funding; individuals and donors; board and organizational development; keys to leadership; and putting it all together. A sample corporate sponsorship presentation package is followed by a case study. (DB)

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IL NET Presents…

ED 479 819

Mobilizing Resources for Independent Living

August 5-7, 2002
New Orleans, LA

EC 309 755

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Expanding the Power of the Independent Living Movement

IL NET
an ILRU/NCIL National Training and Technical Assistance Project

Expanding the Power of the Independent Living Movement

MOBILIZING RESOURCES FOR INDEPENDENT LIVING

A National Conference

Participant's Manual

August 5-7, 2002

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Mobilizing Resources for Independent Living
A National Conference
New Orleans, LA
August 5-7, 2002

Participant's Manual
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Mobilizing Resources for Independent Living

Agenda

Monday, August 5

8:30	Continental Breakfast
9:00 – 9:30	Welcome, introductions and review of agenda
9:30-10:30	Funding trends across America: private foundations, corporations, government, religious, philanthropic trust, and individuals
10:30-10:45	Break
10:45-12:00	Advantages and Disadvantages of different funding Sources
12:00-1:30	Lunch on Your Own
1:30-2:30	TIPS on raising money - 10 key principles
2:30-4:00	Eight Step Strategic Approach to Grants including: [With a break at 3:15-3:30] • Identifying funding needs- exercise • Drafting summary statements • Researching funding sources • Letter of introduction • Interview and asking for money-exercise • Overview and 'tips' of the proposal • Politics and lobbying of the grant • Life after the decision
4:15- 5:00	Media, Marketing, and Money- strategies to "position" Your ILC in your community

Tuesday, August 6

8:30	Continental Breakfast
9:00-10:00	Media, marketing, and money continued
10:00-11:00	Funders Panel Sue Killam, Louisiana SILC, facilitator Walt Eldridge, Exxon/Mobil Refining and Supply Deanna Rodriguez, Entergy Corporation Mike Salmon, philanthropist Ashley Shelton, Baton Rouge Area Foundation
11:00-11:15	Break
11:15-12:00	Question and answer session with the funders panel
12:00-1:30	Lunch on Your Own
1:30-2:30	Corporate Sponsorships, Partnerships, and Cause Related Marketing
2:30-3:30	Faith Based and Religious Partnerships and Funding Relationships- for your advocacy, public policy and social justice work
3:30-3:45	Break
3:45- 5:00	Wealth in America: raising money from individuals and donors- from small donations to major gifts

Wednesday, August 7

8:30	Continental Breakfast
9:00-10:30	Case Study- DO GOOD Independent Living Center in Pleasantville, USA
10:30-10:45	Break
10:45- 12:00	Organizational Development and Involvement : Staying true to your mission and philosophy • Role of the staff in development • Leading the board • Planning and strategic thinking • Hiring a grant writer and/or development staff person
12:00-1:30	Lunch on Your Own
1:30-3:00	Putting it all together: The elements of an overall resource development plan.
3:00	Training Ends

About the Trainers

Richard Male is a recognized leader, both regionally and nationally, in the fields of leadership development, fundraising, community organizing and public policy for non-profit organizations, local municipalities and schools.

For 28 years he has conducted training sessions, provided consultation, been a keynote speaker, teacher and facilitator to literally thousands of organizations. These include faith-based and grassroots community organizations and people working at the neighborhood, statewide and national levels. During this time, Rich has been involved in grassroots and national public policy issues such as the passage of the Home Mortgage Disclosure Act, Community Reinvestment Act, and the Americans with Disabilities Act (ADA). A few of Rich's clients include the National Council on Independent Living, the New York State SILC and the California Foundation for Independent Living. He has served as executive director and CEO of three broad-based nonprofit organizations in Missouri, Utah and Colorado. In 1981, Rich founded the Community Resource Center (CRC), which has provided a wide variety of training, consulting, and leadership services to over 3,000 non-profit organizations in the Rocky Mountain West and throughout the United States. While at CRC, Rich helped organize the Colorado Association of Non-profit Organizations (CANPO), Community Shares of Colorado, published the Colorado Grants Guide, and helped organize dozens of grassroots initiatives involving people of color, persons with disabilities, and environmental and social justice issues.

While at CRC, Rich obtained a national demonstration grant from the W.K. Kellogg Foundation to organize a public policy institute and statewide organization, which develops grassroots leadership to impact public policy at a local and statewide level. Under Rich's leadership, CRC was honored with the **Samaritan Institute Award** from the **Colorado Ethics in Business Award** as the organization that exemplifies the highest ethical values through its work in the community. In 1997, the **Colorado Association of Non-Profit Organizations** awarded Rich their highest honor, the **William Funk Award for Building Community.**

With Rich as director, the work of Community Resource Center has been highlighted on the NBC Today Show, NBC News with Tom Brokaw, *Denver Post, Chronicle of Philanthropy,* Colorado Public Radio, Austrian Radio and Television and other media.

Since 1971, Rich has taught both undergraduate and graduate level courses in subject areas such as grant writing, fundraising and resource development, leadership development, community organizing/public policy; contemporary issues in society; religious institutions in the community; and proposal writing. He has taught at the following colleges and universities: State University of New York (SUNY), Washington University (St. Louis), Iliff School of Theology (Denver), Regis University, University of Colorado at Denver and Metro State College. He also received the **1996 Excellence in Teaching Award in Graduate Programs of the School for Professional Studies** at **Regis University.**

Rich has served on many local and national boards of directors, including the national Committee for Responsive Philanthropy (Washington, D.C.), CANPO, and the National Philanthropy Day Committee.

In 1993 and 1994, Rich was invited to provide community organizing, leadership development and fundraising assistance to a wide variety of civil and human rights groups in Israel. He worked with the Ethiopian, Russian, Palestinian and disability communities throughout the country. In 1995 Rich was awarded a fellowship to be part of the international symposium on leadership as a Salzburg, Austria fellow.

In 1996 Rich formed Grant Guides Plus, a for-profit corporation that provided information, training and educational assistance to non-profit organizations, schools and local governments nationally. GGP was most visible through the publication of sophisticated databases, research instruments and grant writing services and was the publisher of comprehensive grant guides for the states of California, Pennsylvania, Ohio, New York and New Jersey. In 2000 Rich merged Grant Guides Plus with a new company called GrantSeeker.com that provided an on-line searchable database for nonprofits, schools, and local governments throughout the country. Grantseeker analyzed over 19 billion dollars in grants from private foundations, corporations, government and religious funding sources and has one of the premier search engines on grants in the country.

Lee Schulz has been the Executive Director of Independence*First* in Milwaukee since 1986. He is also a past treasurer, Region V Representative, and Regional Representative Chairperson for the National Council on Independent Living (NCIL). In addition, he is a past member of the Wisconsin State Independent Living Council and was co-founder of the Wisconsin Coalition of Independent Living Centers and its first Chair.

In 1986, Independence*First* (then called SEWCIL) had a $265,000 budget and was operating in the red. In 2001, Independence*First*'s income was $17 million and the 2002 budget is now nearing $20 million with a reasonable reserve. Corporate and foundation grants were instrumental in Independence*First's* name change as well as marketing, relocation to better facilities, advocacy activities, and advocacy development. Special event activity has been deliberately limited and on a small scale, but useful. The Center is a year and a half into work developing additional entrepreneurial initiatives for future diversified funding streams.

Lee is quite forthcoming about mistakes he has made and everyday problems he has had that many others have in leading an independent living center, e.g., how we underestimate the cost of fundraising and the time it requires, the danger of theft and other possible damaging actions to a CIL's reputation.

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ABOUT ILRU

The Independent Living Research Utilization (ILRU) Program was established in 1977 to serve as a national center for information, training, research, and technical assistance for independent living. In the mid-1980's, it began conducting management training programs for executive directors and middle managers of independent living centers in the U.S.

ILRU has developed an extensive set of resource materials on various aspects of independent living, including a comprehensive directory of programs providing independent living services in the U.S. and Canada.

ILRU is a program of TIRR, a nationally recognized, free-standing rehabilitation facility for persons with physical disabilities. TIRR is part of TIRR Systems, a not-for-profit corporation dedicated to providing a continuum of services to individuals with disabilities. Since 1959, TIRR has provided patient care, education, and research to promote the integration of people with physical and cognitive disabilities into all aspects of community living.

ABOUT NCIL

Founded in 1982, the National Council on Independent Living is a membership organization representing independent living centers and individuals with disabilities. NCIL has been instrumental in efforts to standardize requirements for consumer control in management and delivery of services provided through federally-funded independent living centers.

Until 1992, NCIL's efforts to foster consumer control and direction in independent living services through changes in federal legislation and regulations were coordinated through an extensive network and involvement of volunteers from independent living centers and other organizations around the country. Since 1992, NCIL has had a national office in Arlington, Virginia, just minutes by subway or car from the major centers of government in Washington, D.C. While NCIL continues to rely on the commitment and dedication of volunteers from around the country, the establishment of a national office with staff and other resources has strengthened its capacity to serve as the voice for independent living in matters of critical importance in eliminating discrimination and unequal treatment based on disability.

Today, NCIL is a strong voice for independent living in our nation's capital. With your participation, NCIL can deliver the message of independent living to even more people who are charged with the important responsibility of making laws and creating programs designed to assure equal rights for all.

ABOUT THE IL NET

This training program is sponsored by the IL NET, a collaborative project of the Independent Living Research Utilization (ILRU) of Houston and the National Council on Independent Living (NCIL).

The IL NET is a national training and technical assistance project working to strengthen the independent living movement by supporting Centers for Independent Living (CILs) and Statewide Independent Living Councils (SILCs).

IL NET activities include workshops, national teleconferences, technical assistance, on-line information, training materials, fact sheets, and other resource materials on operating, managing, and evaluating centers and SILCs.

The mission of the IL NET is to assist in building strong and effective CILs and SILCs which are led and staffed by people who practice the independent living philosophy.

The IL NET operates with these objectives:

- Assist CILs and SILCs in managing effective organizations by providing a continuum of information, training, and technical assistance.

- Assist CILs and SILCs to become strong community advocates/change agents by providing a continuum of information, training, and technical assistance.

- Assist CILs and SILCs to develop strong, consumer-responsive services by providing a continuum of information, training, and technical assistance.

Mobilizing Resources for Independent Living

Learning Objectives

Participants will learn:

1. How to capitalize on current funding trends among private foundations, corporations, government, religious funders, philanthropic trusts, and individuals.

2. How to identify fundraising approaches compatible with their organization and local situation.

3. How to establish relationships with funders before asking for money.

4. How to ask for money in ways that make clear who their organization is and what the funding would be used for.

5. How to stay true to the IL mission and philosophy while fostering growth.

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MOBILIZING RESOURCES FOR INDEPENDENT LIVING

ELEMENTS OF A FUNDRAISING PLAN

By

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MOBILIZING RESOURCES FOR INDEPENDENT LIVING ELEMENTS OF A FUNDRAISING PLAN

By Richard Male

INTRODUCTION: The purpose of the fundraising plan is to have a planning document that clearly spells out the overall fundraising picture of the organization. In most plans, the agency takes a historical look at the past three years and seeks to project probable funding sources three years into the future.

In the introduction to the fundraising plan, the ILC articulates the overall goals for the plan (such as we want to diversify our funding strategy, want to increase our controllable income, want to form strategic partnerships, want to broaden out from over reliance on government funding) listing the key elements within this document.

BACKGROUND: In this section we cover the historical background and impact of the organization. The key sections should include:

- History and historical impact (accomplishments) of the agency
- Mission statement
- Current Programs with one sentence description of each program

CASE STATEMENT: The case statement is a clear, concise, compelling one page statement spelling out the reasons a donor would want to make a contribution or grant to your organization. Within the context of the plan, this statement should pull together some of the above information and should reflect the passion of the organization

DEMOGRAPHIC INFORMATION- EXTERNAL ANALYSIS- This section should encompass the external environment that is creating a need for the organization. In this section include:

- Economic and social indicators- for example poverty, educational, housing, health care; cultural and digital divide issues, etc
- Political climate- What are the political factors that are working either for or against the organization. What is happening in Washington and your state that may support or derail our efforts to raise funds for our constituency and the ILC?

SWOT ANALYSIS – A SWOT (Strengths, Weaknesses, Opportunities, Threats) assessment provides a quick overview of the organizational dynamics, identifies strengths and opportunities from which to build, identifies weaknesses and potential threats, and helps to determine if the threats identified are real and controllable or uncontrollable. If the threats are uncontrollable, such as the general economy or the weather, understand them, but do not spend much time acting on what is out of your control.

The Strengths and Weaknesses are INTERNAL to the organization and the Opportunities and Threats are EXTERNAL. Try to do the SWOT with a combined group of the staff and some key board members. After you list the SWOT on a flip- chart be sure to analyze what it means for the organization.

ORGANIZATIONAL DEVELOPMENT/DYNAMICS- In this section the agency wants to analyze the strengths and weaknesses of the board of directors, especially as it pertains to its capabilities to raise funds. Is the board an active or passive body of people? Are there people who are positioned to open up funding doors? Does the board have a history of raising funds? Is it motivated to raise funds? Is there strong leadership on the board? What about the president of the board, is she/he a strong leader? If you would have to pick an animal or insect to describe the board what comes to mind and why? In many cases with grassroots organizations, the board was not designed as a fundraising board. Therefore, the development of a resource development committee that has strength, influence and contacts should be organized to help implement the plan.

In this section we discuss the role of the CEO/Executive Director plays in the fundraising process. Is the Executive Director the founder? Is she/he a charismatic or a passive leader? Does she/he have a strong influence on the board of directors? Does she/he have good contacts in the corporate, foundation, religious, and governmental communities? Can these contacts be used to open doors to raise new money?

What can do done to increase board and staff involvement in the fund development process? Is there a need for retreat or board training? Do new board members need to be recruited who bring in new skills, and contacts? Do we need to strengthen our fundraising committee on the board?

FUNDING HISTORY- Gives a historical sense of where the money has come from to support the organization. Try to break down this analysis by funding sources and years? What % of money historically has come from government funding, private foundations, corporations, donors (individuals), earned income, religious, planned giving (if any), special events, United Way, etc. Have these percentages been increasing or decreasing during the past three years. You may want to break down the revenue by program areas since much of the pubic and foundation funding will be restricted to specific programs.

FUNDING OPPORTUNITIES- This is where the agency looks at funding opportunities initially for the next 12 months and into the future. Most agencies break down their funding needs into four areas:

- Programs and projects
- Administrative
- Equipment
- Capital (if you are raising money for building, expansion, or major renovations)

For each one of the areas it is important to establish **funding goals** (dollar amounts needed) for each of the areas and to write a one-page summary sheet of each of the above funding goals that include:

- Description of the funding need
- Goals and objectives of the funding need
- Impact to the community AND to the organization
- Dollar amount needed

This section is one of the longest sections in the plan because most agencies have multiple programs that need funding. In addition administrative, equipment needs and perhaps capital campaign requirements are detailed.

THE FUNDING STRATEGY - This is where the agency analyzes the primary funding sources identified by our research and includes the strategic approaches to them. Be aware that researching potential funding sources is an ongoing task that requires regular contact with the people in the community; reading the newspapers daily, regular follow-up with the funders to assure that confidence in the organization is strong and future funding opportunities are known.

Remember that much of fund raising is relationship driven so the more visible the organization is in the community through board and staff contacts the greater the possibility of receiving money. Also make sure you integrate **marketing materials** (brochures, newsletters, e-mail letters, etc) with a consistent brand image that is woven together with effective **public relations** efforts such as:

- Regular letters to the editor from board members and Executive Director
- Radio talk show interviews
- Public service announcements and press releases
- Periodic meetings with newspaper editorial boards
- Media coverage on all major news and special events
- Television interviews on public service shows
- Keying into national news stories with the local angle

In the Funding Strategy section take each individual funding category and write a few paragraphs about what is the funding strategy for each category. Such as:

- **CORPORATIONS-** Corporations in our community are funding non-profit organizations that will give them visibility and an opportunity to get in front of people to assist in their marketing efforts. Do the following to identify new companies: inventory our board, volunteers and community contacts and use these people as door openers, identify the top 50 companies in our community and read about them in business publications, internet research, newspapers; identify the appropriate person to set up the appointment. You are determining whether the "image" of the company fits into the mission and credibility of our organization. After this is done, we want to approach: Wells Fargo Bank, AT&T, JC Penney Company, Mead Paper Company, etc. For each company we want to list who will make the approach, what is our strategy, and what we are going to ask the company for?

- **FOUNDATIONS-** In the same way as above the agency needs to research the new funding sources starting with community foundations, family foundations, and philanthropic trusts. Start off in the local community, and then broaden the search to statewide and national foundations. Use all research materials available and develop the strategic approach--target a range of 8-12 new foundations during the next year

- **GOVERNMENT-** If you have already received government funding, stay on top of existing government programs and remember that much of the public funds are being decided on the state and local level. Make sure you are pro-active on the strategic approaches for public funding and you know your mayors, representatives, and senators.

- **RELIGIOUS COMMUNITY-** If your program areas fit into the religious communities' agenda such as human services, homelessness, advocacy and social change, environmental justice, etc, develop a strategic approach to each church or temple, Use your volunteers and staff who are members of the religious institutions to make the introductions. Remember, even if you are not approaching the religious institutions for money, they are GREAT places to meet people.

- **DONORS-** 90% of all philanthropic dollars come from individuals. What is our strategy for developing and/or expanding our numbers and quality of donors? Are we going to use a direct mail strategy to reach new donors? Can we identify new donors through our planned special events? What is our approach?

- **SPECIAL EVENTS-** Do we already have special events? Are we planning new ones? What are the goals of the special event- i.e. it is public relations, making money, to increase our mailing list? How can we obtain corporate underwriting/sponsorships to assure the event is profitable? What are the revenue projections? What are the costs? What are the anticipated profits? How can we leverage these events to raise new money?

- **EARNED INCOME-** Do we have an earned-income strategy for the organization? Are there any services that we can market to our constituency or the community that can generate revenue? Can we market any services to corporations that they will underwrite or contract with our agency to provide? Are there products that we can market to our members that can save them money? If any of the above looks feasible, form a committee of people (including a few successful entrepreneurs) and strategize ideas and develop a business plan.

- **MEMBERSHIP-** Does the agency have any provisions for a membership? If not, do we want to consider developing a membership category? What is our marketing and public relations strategy for maintaining our existing membership and increasing our membership by 10% during the next year?

STRUCTURE OF THE FUND RAISING STRATEGY- The implementation of the above elements of a fund raising plan takes an organizational commitment. Strategies and key leadership come from selected board members and the executive director. My suggestion is to form a board committee to review this document and at the monthly board meetings have the head of the fundraising committee report back to the board on the progress made, changes, etc. For each one of the above funding sources, it is important to develop tracking sheets to make sure that the results are analyzed and the appropriate changes are implemented. For each funding category the following may be desirable:

- Specific strategy with timelines for accomplishments and for what each particular person is responsible

- For each specific funding sources (Proctor and Gamble, Wells Fargo Bank, First Presbyterian Church) input on the computer data base or write on a 3"X5" card: funding source, address, phone number, contact person, date contact made, results of the contact, follow-up.

- Take the information and develop a 12 month fund raising calendar with the funding sources on the left hand of the chart and the months on top and list when organization is planning and conducting the special event, when the direct mail will be "dropped" when are we approaching key corporations, when is the RFP due, etc.

- Then for each one of the funding categories, such as FOUNDATIONS- break down for each specific funding sources when during the year, the approaches will be made to the Rose Community Foundation, Kellogg Foundation, Ford, etc.

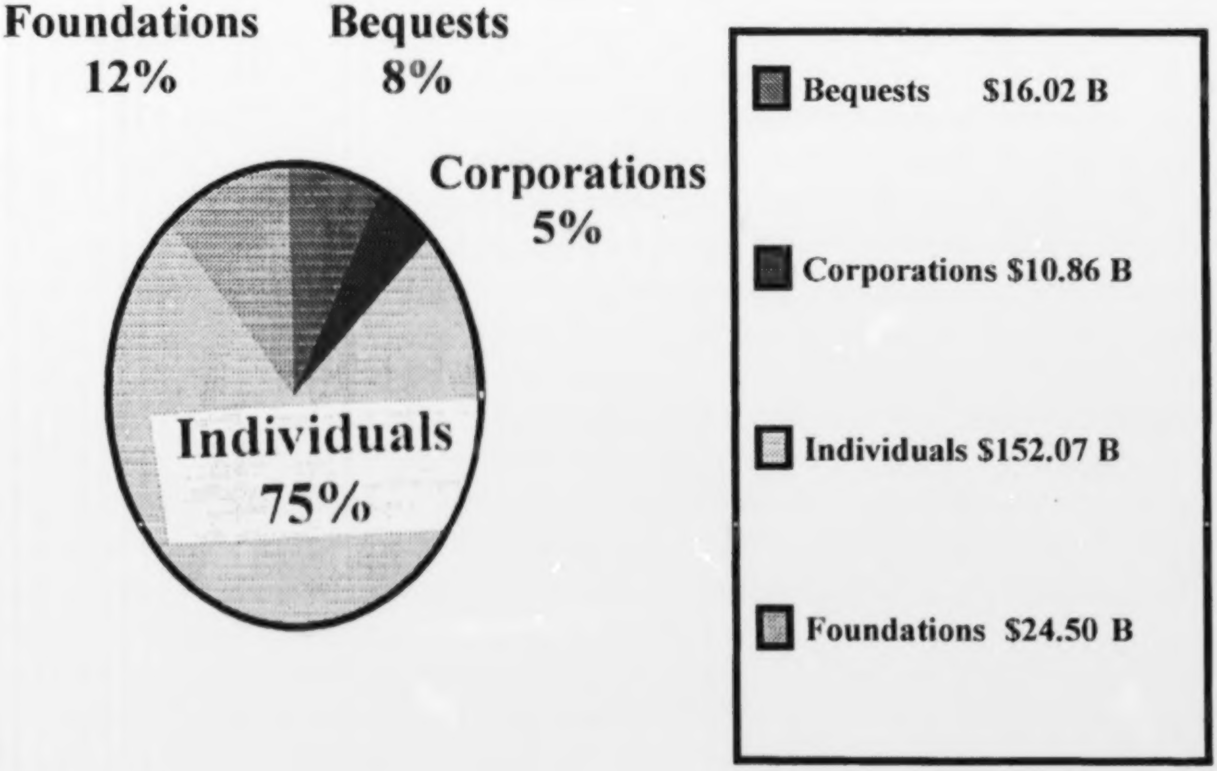
Mobilizing Resources for Independent Living Centers

A PowerPoint Presentation
By Richard Male

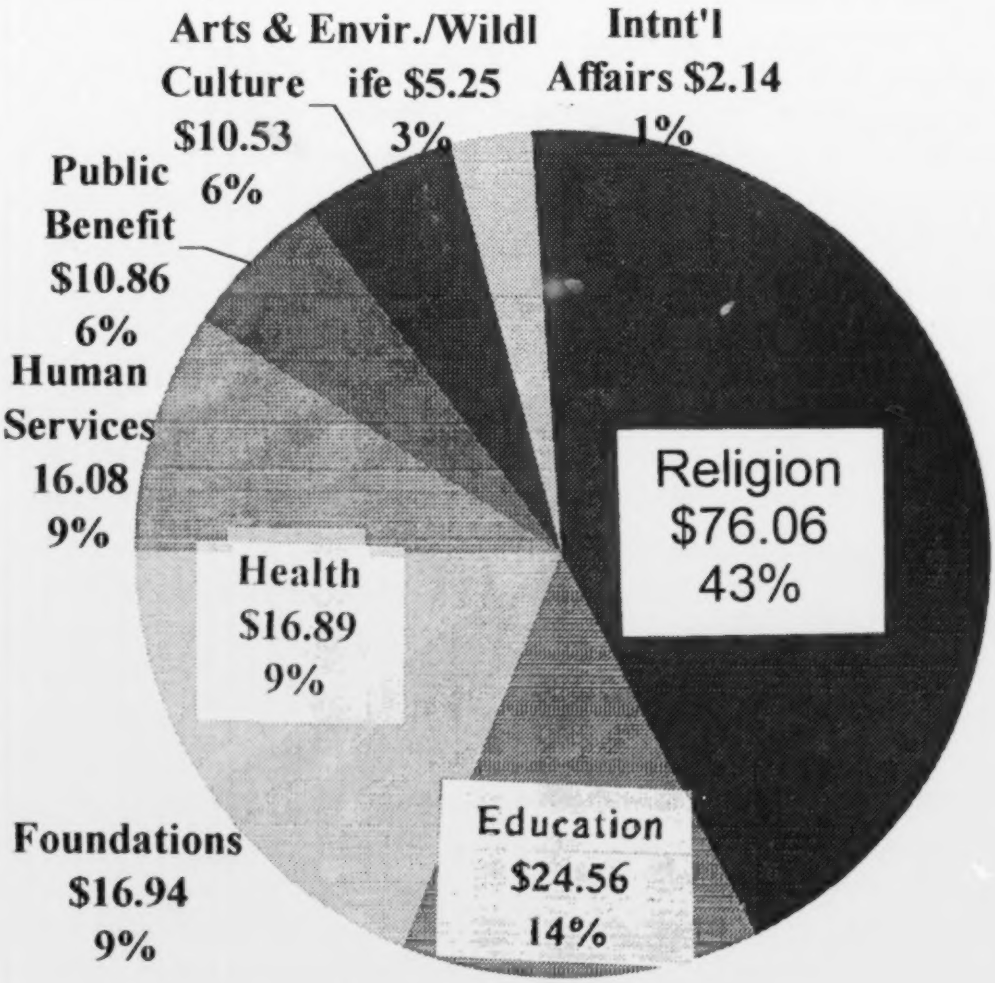
New Orleans
August 2002

Funding Trends Across America

2000 Contributions
$203.45 Billion



Where the Money Goes



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Current Trends and Future Issues

- Shift of federal dollars to state and local jurisdictions.

- Less federal money is available except for "trendy" issues.

- Foundation giving has increased by 28%, but will be flat for the next year

- Of the country's 42,000 foundations, only 2% have more than $50 million.

- Philanthropic trusts managed primarily by financial institutions are growing significantly.

Types of Foundations

- Private Foundations: Staffed
- Private Foundations: Un-staffed
- Operating Foundations
- Corporate Foundations
- Community Foundations

Raising Money From National Foundations

Strategies for National Funders

- "Concept paper" Driven
- Staff Focused
- Grantee or Key Person Introduction
- Personal Interview a Must
- Perseverance is Important
- Intermediaries

What National Foundations Are Looking For

- Replication
- Broad Impact
- Strategic/Innovative Partnerships
- Geographic Focus
  - *Community*
  - *Region*
  - *State*

Philanthropic Trusts
The Hidden Pockets of Money

- Managed by trust departments at Financial Institutions
- Use banking relationships to gain access
- Smaller Grants – Under $10,000
- Purpose – can be used as general operating funds
- Generally long term support

Current Trends and Future Issues (continued)

- Corporate philanthropic giving is flat, strategic marketing is the growth area.

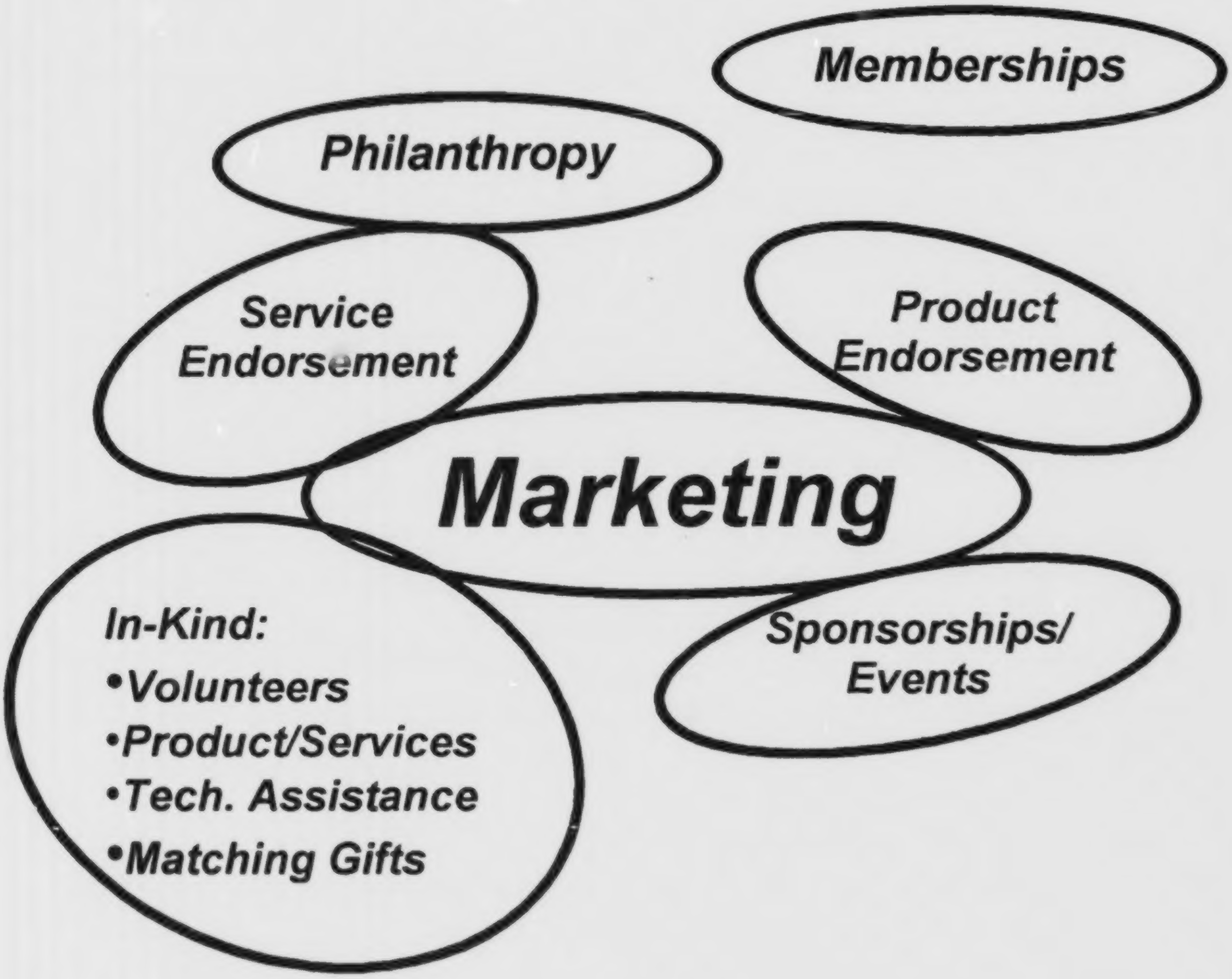
- Giving by individuals will continue to grow.

- Religious giving will continue to grow as donations come primarily from individuals.

- Researchers predict a huge transfer of wealth.

- RFPs (requests for proposals) are becoming increasingly competitive.

New Corporate Philanthropy



Memberships

Philanthropy

Service Endorsement

Product Endorsement

Marketing

In-Kind:
- *Volunteers*
- *Product/Services*
- *Tech. Assistance*
- *Matching Gifts*

Sponsorships/ Events

Two Vehicles of Giving:
- **Corporate Giving Programs**
- **Corporate Foundations/Trusts**

Advantages and Disadvantages of Funders

Advantages & Disadvantages of Funders

Foundations

Advantages

1. Larger Sums of Money
2. Not much paper work
3. Will fund special projects, programs, capital

Disadvantages

1. Takes a long time
2. Good for only 3 years
3. Over dependence on large grants
4. Usually does not fund admin expenses

Corporations

Advantages:

1. Self interest
2. Receive money over long periods of time
3. Good to leverage other private money
4. In-kind donations

Disadvantages:

1. Can be nickled and dimed to death
2. Small amounts—if given through the giving program
3. Not always responsive to new and controversial issues

Advantages & Disadvantages of Funders

Churches

Advantages:

1. Long term sources of income
2. Involvement of membership
3. Donated services
4. High leverage—good potential with other church money (national)
5. Access to key people

Disadvantages:

1. Long time to receive money
2. Must have support locally from religious leaders

Grassroots

Advantages:

1. Involves membership
2. Recruits new people
3. Demonstrates involvement when approaching corporations, foundations and churches

Disadvantages

1. Takes staff/volunteers
2. If not planned with cost benefit ratio too low

Advantages & Disadvantages of Funders

Donors—Small and Large

Advantages:

1. Reliable over long run
2. Introductions to friends—increase network
3. Short timetable
4. 80% of donations come from individuals
5. Basis of planned giving, endowment and large gifts

Disadvantages:

1. Direct mail is expensive & long term
2. No obvious disadvantages with donors

Overview of Public and Private Funding

Public

1. RFP Driven
2. Fee for Service
3. Proposal is Key
4. Large Amount of $$$

Private

1. Project/program Driven
2. Grants
3. Relationship is Key
4. Small to Medium Grants

Tips on Raising $$

10 Key Principles to Successful Fund Raising

1. The proposal is only 10% of the grantseeking process
2. People give to other people--relationship is key
3. People give because of self interest
4. Find the "key person"
5. Money follows people
6. Be specific $$$, purpose and timeline
7. Plan ahead, raising money takes time
8. Diversify
9. Market and sell your organization
10. Fund raising is an everyday art

Ladder of Effectiveness

MOST

- Person-to-person
- Personal letter – follow up phone call
- Personal phone call – follow up mail
- Personal letter
- Personal phone call
- Special event
- Impersonal letter
- Door – to – Door
- Product sales
- Impersonal Call
- Media advertising

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How to Ask for Money
Whetting Their Appetite

- Repeat the name of your organization often
- Say your name, the name of your group and your position
- Describe your groups activities and its effectiveness
- Describe your budget
- Describe your fund raising strategy
- Always ask for a specific amount of $$$
- Always ask for money for a specific part of your program
- Break down your request into terms – " your donation will be used for ….."
- Explain why you need the money now –urgency without crisis
- If the donation is tax deductible say so
- Ask for the dollar amount again
- Smile stop talking. Wait for a response
- Answer questions briefly
- Repeat first six steps until they say yes

Average Length of Time to Raise Money

- Short-term money (three months)
- Mid-term money (three to six months)
- Long-term money (six to eighteen months)

Average Amounts of Lead Time

Foundations	Amount	Lead Time
Local	$5,000	6-18 mths
National	$10,000	12-18 mths
Corporations		
Neighborhood	$100-1,000	1-3 mths
Financial Institutions	$2,000+	up to 6 mths
Large Local Corp	$1,000+	up to 6mths
Branch Corp	$1,000+	6-12 mths

Average Amounts of Lead Time (cont.)

Churches	Amount	Lead Time
Local Congregations	$500-2,000	12-18 mths.
Judicatory	$42,500	12-18 mths.
National ➢Empowerment ➢Special constituency ➢Division ➢Women	$5,000+	6-12 mths.
Individual/Patron/Direct Mail		
Large Donors	$100-1,000	3-6 mths.
Wealthy Donors	$2,500	6-12 mths.

Average Length of Time to Raise Money (cont.)

Short-term money

- ➢Individuals, patrons, donors
- ➢Small special events
- ➢Volunteer canvassing
- ➢Direct mail
- ➢Neighborhood businesses
- ➢Ask board members
- ➢Cash flow loan

Mid-term Money

- ➢Local foundations
- ➢Local churches
- ➢Larger special events
- ➢Service clubs
- ➢National religious organizations
- ➢Corporate sponsorships
- ➢Large donors

Average Length of Time to Raise Money (cont.)
Long-term Money

- National and statewide foundations
- Financial institutions
- Large corporations
- Branch corporations
- Judiciary and national churches
- Government
- Professional canvasses
- United Way
- Business ventures
- Service clubs
- Large donors
- Earned income

Controllable vs. Uncontrollable Income

Controllable

- ➢Fee for Service / Contracts
- ➢Memberships
- ➢Small Donors under $100
- ➢Large Donors over $100
- ➢Special events
- ➢Endowment/Wills/Bequests
- ➢Partnerships with Corporations
- ➢Earned Income & Entrepreneurial Ventures

Uncontrollable

- ➢Foundation Grants
- ➢National Religious grants
- ➢Corporate Donations
- ➢United Way organizations
- ➢Governments through RFPs
- ➢Service clubs

8 Steps of Highly Successful GrantSeekers

1. Set clear organizational/program goals and determine funding needs
2. Write summary page
3. Research potential grantees by population groups, geographic focus, trustees, types of support and amount needed
4. Letter of introduction/interview
5. The interview: the schmoozing
6. Proposal: the marketing document
7. Follow-up/politics
8. Life after the decision

Step 1
Set clear organizational / program goals and determine funding needs

- ➢Program
- ➢Administrative
- ➢Equipment
- ➢Capital

Step 2
Summary Page

- ➢Description of the funding needs
- ➢Goals and Objectives of the funding needs
- ➢Impact on the community and the organization
- ➢Dollar amounts needed

Step 3
Research Potential Funders

1. Fields of Interest Index / Population

Be sure to look in every possible area to cross-reference your search.

Example for a homeless womens' shelter:
- women
- homelessness
- housing/shelter
- human services

If you offer additional services, such as literacy training, employment services, or a health clinic, search under health care, education and employment.

Certain funders support specific population groups such as African Americans, Latinos, women and children, persons with disabilities and homeless.

Step 3
Research Potential Funders (cont.)

2. Geographic Indexes

County Index - by grantmaker location shows all the grantmakers that are based in each of the counties (not necessarily where they make grants).

Where Grants are Made Index - shows all the cities, counties and regions where grants have been made (note that this is not necessarily indicative of future funding patterns).

3.Types of Support

Annual Campaigns
Matching Funds
Emergency Funds
Program Development
Seed Money
Equipment
General Support
Loan Programs
Technical Assistance
Building/Renovation
Capital Campaigns
Research
Scholarships
Employee Volunteers
Fellowships
In-kind Gifts
Sponsorships

Step 3
Research Potential Funders (cont.)

4. Trustees

Search Engines

- **Alta Vista**
- http://altavista.com

- **Google**
- http://google.com

- **Dogpile**
- http://dogpile.com

- **Philanthropy Search**
- http://philanthropysearch.com

- **Search Engine Watch**
- www.searchenginewatch.com

Foundation
News / Information /Funding Websites

➢**GuideStar**
➢http://guidestar.com

➢**Foundation Center**
➢www.fdncenter.org

➢**Philanthropy News Network**
➢www.pnn.com

➢**GrantStation**
➢www.grantstation.com

➢**Council on Foundations**
➢www.cof.org

➢**National Council of Nonprofit Associations**
➢www.ncna.org

➢**The Chronicle of Philanthropy**
➢www.philanthropy.com

Government Websites

- **Government Funding Resources**
- http://www.fundsnetservices.com/gov01.htm

- **Federal Register**
- http://www.access.gpo.gov

- **Catalog of Federal Domestic Assistance**
- http://www.cfda.gov/

- **University of Southern California**
- http://www.usc.edu/dept/source/gov.htm

- **U.S. State & Local Government Gateway**
- http://www.statelocal.gov

- **www.firstgov.com**
- **www.nonprofit.gov**

Media Websites

- www.bizjournals.com
- www.newslibrary.com
- www.newsdirectory.com
- Local newspaper website
- Local television station website

Corporate Websites and Research

- **Companies Online**
- www.companiesonline.com

- **Hoovers**
- http://hoovers.com

- **Edgar**
- www.freeedgar.com (free)
- www.edgar-online.com

- **Foundation Center**
- www.fdncenter.com

Individuals

- **Internet Prospector**
- www.internet-prospector.org

- **Lexis-Nexis**
- www.lexis-nexis.com

- **Yahoo's "PeopleSearch"**
- http://people.yahoo.com

- **Edgar People**
- www.edgar-online.com/people

- **Local newspapers / business journals**

Technology Funding Foundations

- Gates Foundation
  info@gatesfoundation.org
- Hewlett Foundation
  info@Hewlett.org
- Adobe Systems Inc
  academic@adobe.com
- AOL Foundation
  AOLgrants@aol.com
- Benton Foundation
  benton@benton.org
- Bothlin Foundation
  (415)-561-6540
- Compaq
  cpq.contributions@compaq.com
- eBay Foundation
  foundation@eBay.com
- Gates Learning Foundation
  libraryinfo@gatesfoundation.org
- Gill foundation
  info@gillfoundation.org
- Imation
  Info@imation.com

Technology Funding Foundations

- Mitsubishi Electric America Foundation
  meaf-info@metca.com
- New Deal Foundation
  info@newdeal.org
- Novell
  bdi@novell.com
- Packard foundation
  communications@packfund.org
- Rockefeller Family Fund
  mmmccarthy@rffund.org
- J.D. & C.T. MacArthur Foundation
  4answers@macfound.org
- The Progressive Technology Project
  info@progressivetech.org
- Working Assets
  hr@wafs.com

Step 4

Writing a Good Intro Letter

Keep the letter short—1 ½ to 2 pages at the most. Remember, the purpose is to get an interview, not to ask for funding.

- Background/history and impact of the organization
- Need for the organization - include demographics
- Goals/objectives of the organization
- Programs of the organization

- Brief background of the board and staff, including qualifications
- Budget size/current funders
- Calls for an interview

Letter must be stimulating, exciting and colorful and should jump off the page. You want the reader to feel "I must meet with these people."

Step 5: Interview

The Interview is Key to obtaining Funding

You Want Three Outcomes

- **"Can we submit a proposal to XYZ Foundation**?" Ask for funding for a specific purpose, timeline and impact.
- **Negotiate** a dollar amount for the proposal. "We want $25,000 to hire 250 at-risk youth for our summer employment program in Columbus."
- **Timeline** - submit the proposal at least 30 days before the deadline.

Step 6:
Proposal, The Marketing Document

- Summary of the Proposal
- Introduction to the Proposal
- Organizational Description
- Statement of Need or Opportunity
- Plan of Action/Program Narrative
- Evaluation Plan
- Request for Funding
- Budget : Cash + In-kind = Total
- Conclusion
- Attachments

Writing Winning Proposals

Tips on Winning Proposals

1. Do your research
2. Know what you want
3. Ask for it in the first paragraph
4. Be specific and concrete
5. Get rid of the jargon
6. Keep it short
7. Follow the guidelines
8. Make it easy to read
9. Proofread, Proofread!!!!
10. Get it in prior (30 days) to the deadline

10 Common Reasons Grants Are Declined

1. The organization does not meet our priorities
2. The organization is not located in a geographic area
3. The proposal does not follow our prescribed format
4. The proposal is poorly written and difficult to understand
5. The proposal is not within our funding range
6. We do not know these people, are they credible?
7. The proposal does not seem urgent- I am not sure it will have an impact.
8. The objectives and plan of action of the project exceed the budget and timelines.
9. All money for grant cycle have been allocated
10. No evidence the program will become self-sufficient after grant is complete

Step 7
Follow up / Politics

- Allow 30 days before proposal deadline
- Follow-up telephone call
- 2-3 contacts during the 30 day period
- Letters of support
- "Key" phone calls
- Random act of strategic "run ins"
- Be creative but cautious

Step 8
Life After the Decision

If YES

- Thank you letter –traditional
- Thank you letter- unorthodox

If NO

- Telephone Call
- Thank you letter

Regardless of Yes or No

- Put on mailing list
- Regular email and notes
- Random "run ins"

Invite to Organization

Strategic Marketing

Marketing is…

A process that helps you exchange something of value for something you need

Benefits of Marketing…

- Define your unique niche
- Reach the audience you want
- Decide what you want, go after it and become a more prosperous organization.
- Stand out from the crowd
- Have a greater impact

Step 1

Set Market Goals
- Image Goals
- Action Goals

Step 2

Develop the marketing plan
- Chain of command
- Budgets, timeline

Step 3

Develop a promotion campaign
- Words, phrases, images
- For whom is the message intended?
- What do you want them to do?
- What promotional techniques will do the job?

Strategic Thoughts

- Develop a marketing infrastructure
- Corporate and university Volunteers
- Look at the media in new ways—a tool for building relationships with funders
- What are your goals? Who are your targets?
- Understand the funder's visibility goals
- Develop a human face and case studies
- Learn to use "advocacy" journalism. It gives you more control and opportunities to bond with funders

Newspapers and Print Media

- Always offer the funder the visibility—news release, announcement, etc.
- Write or ghost write op-eds to bring the funder on record
- Editorial board visits—funder can take part
- Repackage news clippings—for mailings, newsletters, articles, etc.

Electronic Media

- Radio and Television public affairs programs—few in the audience, but that is ok
- Radio news feeds—more control, works well with smaller stations
- Radio talk shows—can push "hot button" issues
- Video and audio clips—send these around
- The public affairs connection—building relationships with stations

The Organizational 10 in 60 Presentation Exercise

1. Your name and position with organization
2. Name and age of the organization
3. Mission of organization
4. Primary constituency/membership of organization
5. Geographic focus of organization
6. Priority issues of the organization
7. The budget of the organization
8. The name of one of the organization's funders
9. One of the organization's greatest challenges
10. An example of the organization at its best

The Hook: A memorable beginning which immediately captures the attention and interest of the audience.

The Face: A person or persons who are impacted or will be impacted by the issue.

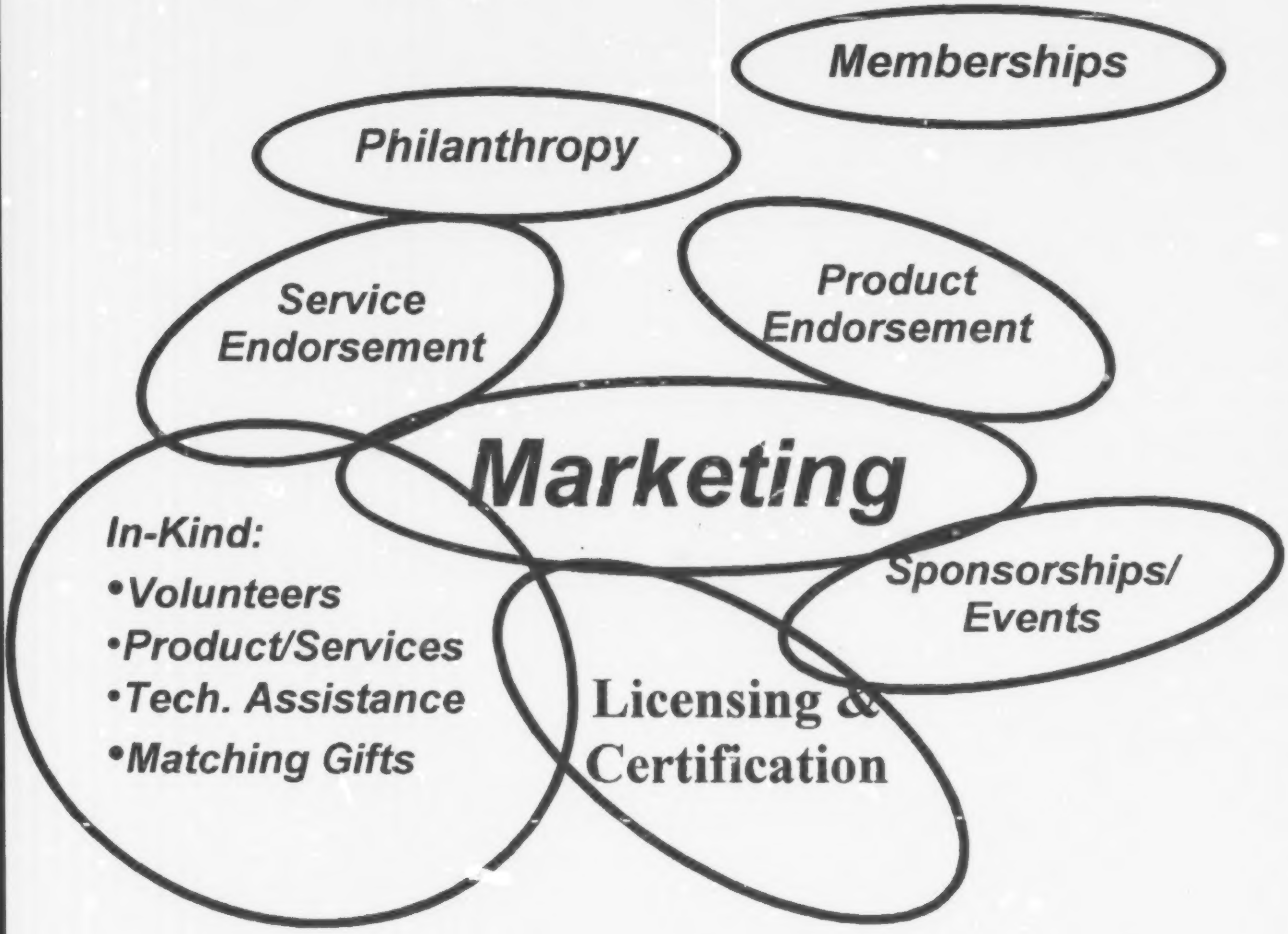
The Connect: How the issues connect to the self interest of the audience.

The Flex: Options or action the audience may select in response to the issue.

The Crunch: A clear request for commitment to action by the audience on the issue including a time frame for the action.

Corporate Sponsorships & Partnerships

New Corporate Philanthropy



Memberships

Philanthropy

Service Endorsement

Product Endorsement

Marketing

In-Kind:

- ***Volunteers***
- ***Product/Services***
- ***Tech. Assistance***
- ***Matching Gifts***

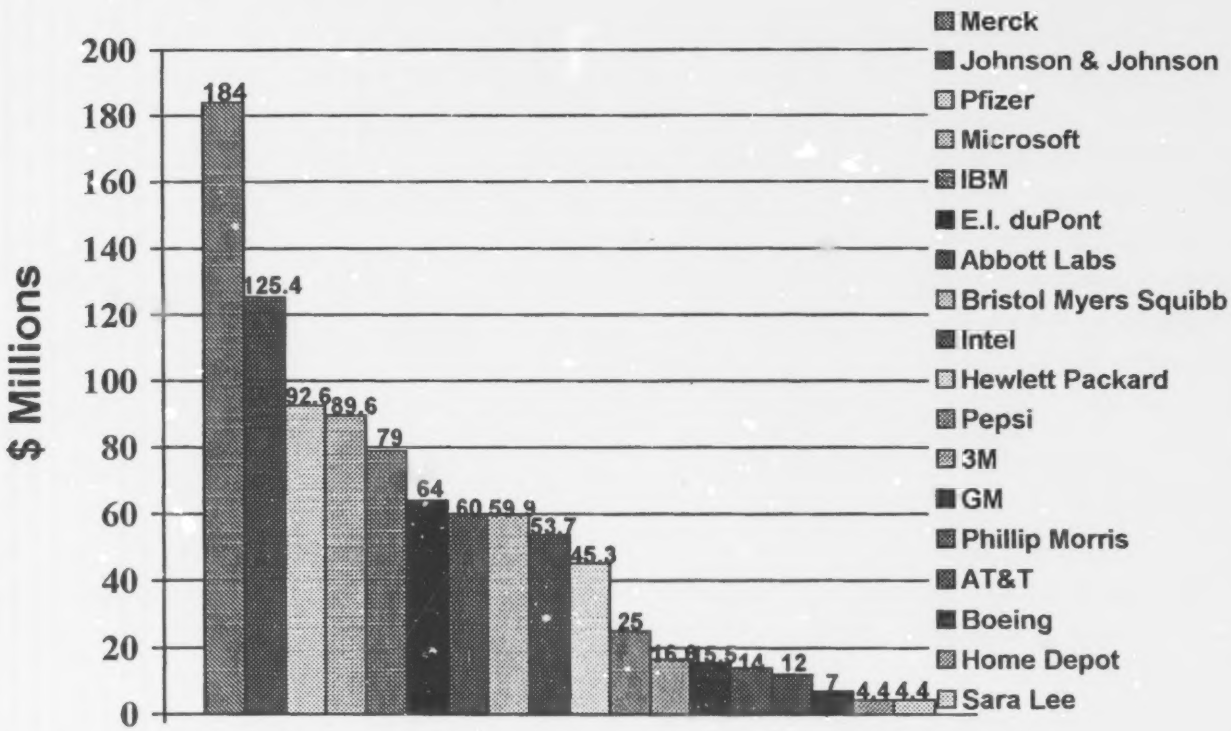
Sponsorships/ Events

Licensing & Certification

Cone and Roper Survey

- 66% of the American consumers found that consumers were likely to switch brands (1993)
- 76% of the American consumers say that when price and quality are equal, they will likely switch brands to companies that are perceived as good corporate citizens (1997)
- 80% of the American consumers have a more positive image of companies that support a charitable cause than those that do not(1998)
- 92% of Americans have a more positive image of companies and product support causes – up from 80% 2001
- After Sept 11th 81% of Americans say they are likely to switch brands, when quality and price are the equal, to help a cause
- At holiday time, 64% of Americans said they planned to purchase a holiday gift that supports a cause, up from 56% in 2000
- Employees whose companies have cause related programs are 38% more likely to day they are proud of the companies values than employees whose companies do not have such programs

Product Donations by Major Corporations in 1998



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Five Pockets of Corporate Philanthropy

- Corporate contributions office or corporate foundation
- Marketing/Advertising budget
- Local branch management in community
- Research and development
- Board of Directors

Corporate Giving – Don't Just Think of Money

There are THREE primary ways in which corporations can help your organization

1. Financial

- Gifts-Traditional Philanthropy (Corporate Foundations)
- Memberships
- Marketing (Corporate Giving Programs)
- Products
- Sponsorships (special events)
- Endorsement of Services
- Matching Gifts

2. In-Kind Gifts / Product Contributions

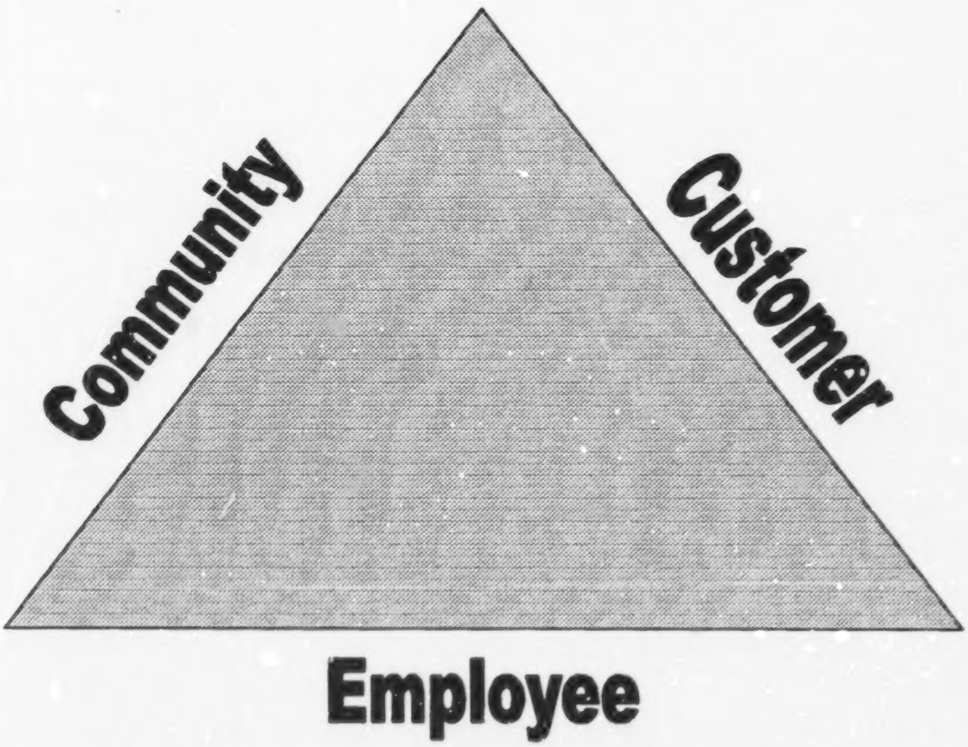
- Office Equipment
- Computers
- Furniture
- Consumer Goods
- Printing
- Use of Facilities
- Donations for Raffles (products or services)
- Advertising (newspapers, TV & in-house/external corporate publications)

Corporate Giving – Don't Just Think of Money

3. Employee Involvement

- Computers/Technical
- Marketing/Public Relations/Media/Design
- Legal (incorporation, bylaws, personnel policies, tax questions)
- Financial (budgeting, financial planning)
- Board of Directors
- Committees (standing committees/committee assignments)

The Corporate Triangle
Benefits to the NPO


Community
Customer
Employee

Benefits to the NPO

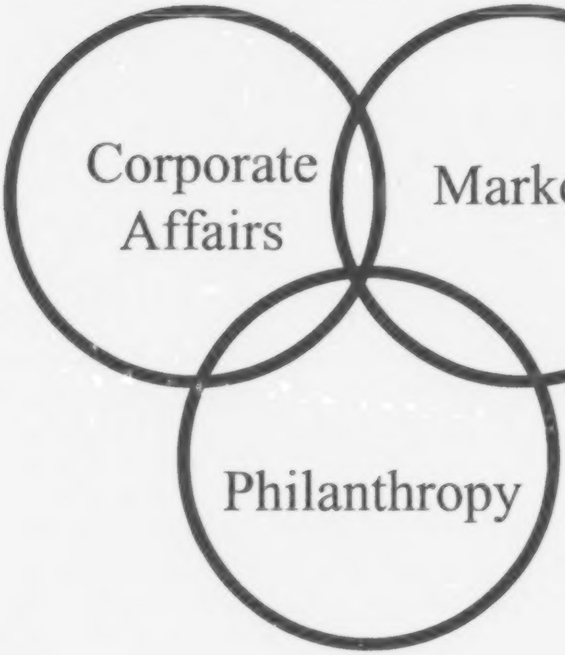
- Impact on mission
- Increased revenue
- Enhanced visibility
- Access to new audiences
- Connections to the corporate world
- Expertise in marketing, strategy development, and other corporate experience

Cause Related Marketing

Philanthropy
Business Bottom Line

"Cause Related Marketing Who Cares Wins"
Sue Adkins

Cause Related Marketing intersects with Marketing Corporate Affairs and Corporate Philanthropy



Corporate Affairs

Marketing

Philanthropy

"Cause Related Marketing Who Cares Wins"
Sue Adkins

Corporate Social Responsibility

Types of Corporate Sponsorships

1. Event Marketing – one-time special event
2. Partner sponsorships – Long-term relationship
3. Cause Related marketing – sponsorship promoting a specific cause or organization through a marketing, purchasing and acquiring of products and services
4. Licensing – Corporations pays charity to use charity's name and logo on products. American Heart Association (cereal), Ducks unlimited.

Steps in Developing Corporate Partnerships

1. Analyze Your Members
   - Numbers
   - Income/ Buying Habits /Where They Shop / Where They Bank
   - Ethnic Make up
   - Geography

2. Research the Corporations : Value Proposition
   - Markets
   - Image
   - Strengths
   - Weakness
   - Key People

3. Match: Assess Needs with Appropriate Corporations

4. Organize a Strategy Committee
   - "Entrepreneur"
   - "Corporate Person"
   - "Value Drive" Board Member
   - Board Leadership
   - CEO or Champion

5. Working out the Deal

Researching Prospective Sponsors

- Who is attending the event
- What is their age
- Which gender
- What is the geographic location
- What is the ethnic and economic backgrounds
- What do they read, buy and watch
- What are their interests

What the Company Will Ask

- Will the sponsorship increase visibility (how many people will be exposed to our stuff)?
- Will the visibility lead to increased sales?
- Can we meet with the Leadership of the organization
- Will it be a one-time event relationship or a partnership?
- Does the audience and product fit our profiles?
- Is the media and public relations in place?
- Do we have enough lead-time?
- Do we have flexibility?
- How much do we have to do? Can we just show-up?
- Does the organization have good credibility? Reputation?
- Do we have an exclusive

Sponsorship Proposal

- Description of organization
- Previous / similar events
- Overview of the event
- Description of who is attending
- Past sponsors and participants
- Media plan for event
- List of what sponsor is required to provide
- Separate page of contact information

Corporate Partnerships
Approach to the Corporation

Marketing Not Philanthropy

Negotiations

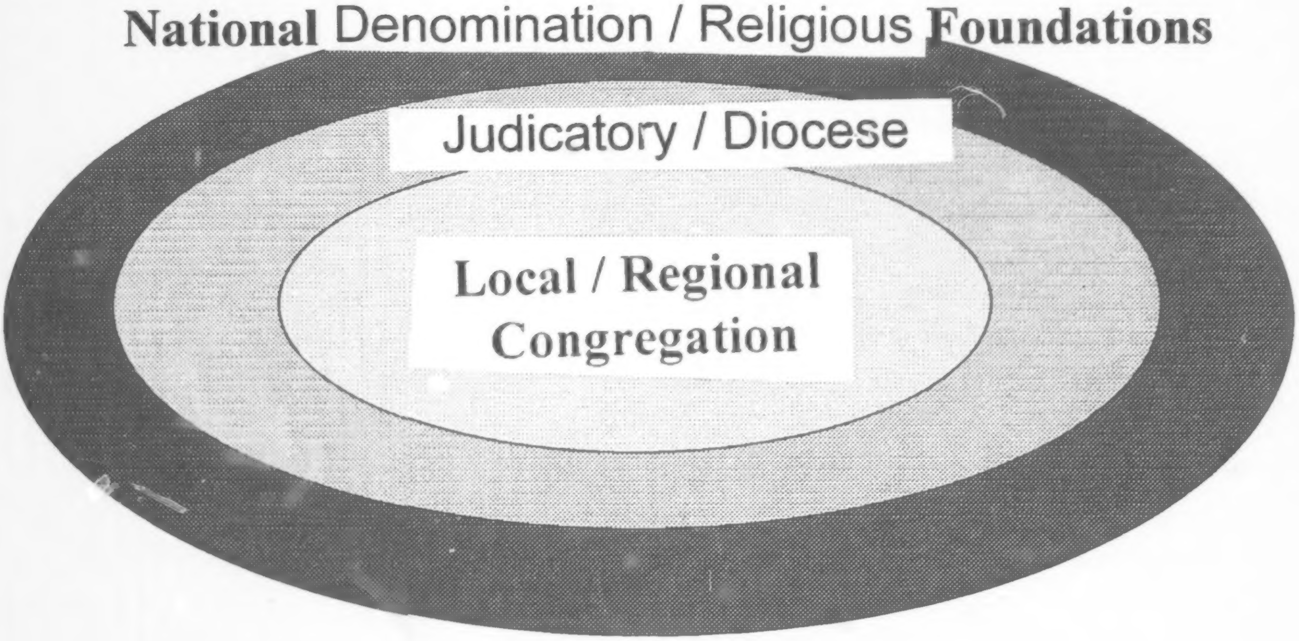
Follow Up

Tips on Corp/NPO Relations

- Corporations are looking for on going presence rather than a one time events
- Corporations can't say how great they are as well as you can
- Some corporations are look for "exclusive" agreements ASK!
- Relationship is key – BUT only opens the door
- Move relationships to partnerships
- Don't offer solutions in search of a problem - be clear, what are you doing, what are you seeking to change
- Become a customer first! Business relationships are better than charitable relationships
- A deal is only as good as your ability to deliver – Don't over commit
- People may forget what you say but not how they feel about you and how you make them feel
- Exceed everyone's expectations

Religious Funding

Strategies For Religious Funding



National Denomination / Religious **Foundations**

Judicatory / Diocese

Local / Regional Congregation

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Strategies For Religious Funding

- Lay Involvement
- Meet with Minister, Priest, Rabbi
- Get Support From Local Congregation
- Advertise in congregation bulletin and newsletter
- Network through your constituency
- Be visible with a congregation

Religious Funders

1. Congregational Level
   - Mission Fund of the Congregation
   - Women's Group
   - Youth Group
   - Seniors
   - Prayer Breakfast (Men)

2. Diocese/Regional/Judicatory

3. National Denominations
   - Special Population
   - Targeted Funds - Housing, etc.
   - Women's Fund
   - Emergency/Relief
   - General Fund

4. Religious-Based Foundations

Individuals and Donors

3 Types of Wealth in America

1. Old Wealth
2. New Wealth
3. Millionaire Next Door

The Development Process

1. Identify Suspects
2. Convert Suspects into prospects
3. Convert prospect into donors
4. Increase the gift
5. Secure special gift $1000 +
6. Secure major gift $5000+
7. Secure planned gift, wills, bequests

What to Look for in A Prospect

1. Ability to make the size gift you want
2. Belief and passion in your cause
3. Contact – Ability to have someone make the introduction
4. Turn a Suspect into a Prospect

Prospect Identification

You Already Know All the People You Need to Know

1. Start with family and relatives
2. Next move to friends, volunteers, employees, alumni
3. Go to vendors you do business with
4. People with similar interests
5. Have the above groups make the introductions

Portrait of a "Typical Millionaire"

- 57 year old man, married with 3 children
- Self-employed
- Involved in 'dull-normal" business (welding contractor, pest control, paving contractor)
- Average annual family income $270,000
- Average household net worth $3.7 million
- Homeowner, property value $320,000
- First generation affluent
- Lives below means, wears inexpensive suits, drives us made car
- Has enough money saved to live 10 years without having to work
- Attended public schools, children attend private schools
- Works 45-55 hours a week
- Invests 20% of taxable income each year

Individual Donors

Small Donors:

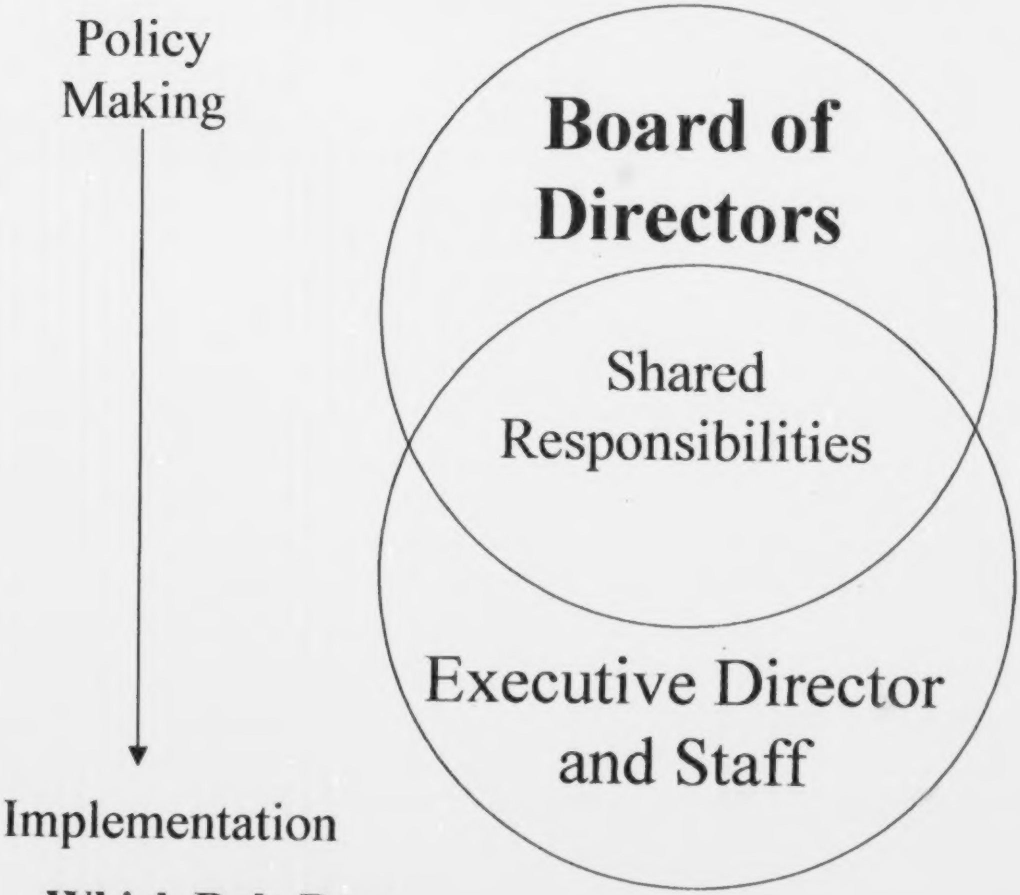
1. **Personal letters from Board Member and volunteers**
   - Average yield 10%
   - If followed by phone call response 20+%

2. **Personal Letters in house mailing list**
   - Average yield 5%
   - If followed by phone call response 10%

3. **House Parties – Hosted by board member or key volunteers**

Board and Organizational Development

Board of Directors – Staff Policy Sphere



Policy Making

Implementation

Board of Directors

Shared Responsibilities

Executive Director and Staff

Which Role Does Your Board Play?

- **Policy Maker?**
- **Watchdog?**
- **Micro-Manager?**
- **Shared Manager?**
- **Rubber Stamp?**

Board and Staff Roles and Relationships

- Trust between Exec Dir, Staff and Board
- Communication is key
- Board-defines what agency is doing and where it is headed
- Staff-how the tasks are accomplished
- Board-policy
- Staff- implementation
- Board-approves budget
- Staff-held accountable to spend resources
- Board-watchdog
- Exec Dir-watches over staff
- Success=common drive
- Board and Staff-independent but interdependent

Elements of a Board Job Description

- Job Title
- Reports to
- Term
- Overview of Organization
- Purpose
- General Duties and Responsibilities
- Specific Responsibilities and Expectations
- Time Commitment

Functional Board Members Job Description

- Planning Functions
- Organizational Functions
- Operations
- Budgeting and Auditing
- Fundraising and Resource Development

Job Description Board President

- Chair all meetings
- Develop meeting agenda with ED
- Assign committee chairs
- Assist in board recruitment
- Appoint yearly auditor and ensure of proper financial and legal filings
- Ensure strong staff support to the board
- Lead board in annual evaluation of Exec Director
- Lead board in review of by-laws, policies and documents to ensure the programs are meeting goals
- Serve with ED as primary spokesperson
- Sign all contracts, grants and other legal documents when appropriate
- Monitor the functioning and organizational / board discipline
- Motivate and support, become the "Leader"

Board Recruitment Strategy Guidelines

- It is an honor to be on the board. The board deserves the very best board you can develop
- You are not recruiting "warm bodies"
- The 3-W theory: Workers, Wealth and Wisdom
- Match strengths and challenges to those you have. (Board Recruitment Grid)
- Fill in the gaps, draw from your network
- Have potential member fill out a Board Application
- Do not overload board with similar skills
- Have acquaintance make the first call to potential member
- 1st- meeting should be informational, Q&A, define roles
- 2nd- meeting invite to a gathering to meet the board and key staff
- After meeting call and invite them to be a board member
- Hit the ground running

Executive Director Job Description

- ➢General Responsibilities
- ➢Specific Responsibilities and Time Commitments
- ➢Fundraising
- ➢Administration
- ➢Program Leadership, Director and Representation
- ➢Other

8 Tips to Motivate Your Board Members in Fund Raising

1. Energize your board members
2. Conduct Yearly Retreats
3. Become visible in your community
4. Position your organization with local and state officials
5. Ask board members to give you the names of their friends
6. Survey board to find out where they conduct business
7. When recruiting board members set high expectations
8. Remember the personal touch

Keys to Leadership

13 Thoughts on the Key to Leadership
by Richard Male

- Move toward your fear / hire your weakness
- Courage is the act of leadership
- Follow your instincts
- True leadership is not a hired position
- A leader motivates people
- Listen first, then act
- Compassion and Passion without Competence is a dysfunctional action
- Leaders are made not born
- Always assume responsibility first
- The only certainty is uncertainty
- Ready-Fire-Aim
- Always plan for your Leaving
- Leaders are judged in time of Crisis and Adversity

Putting It All Together

Elements of a Fund Raising Plan

- Introduction
- Background
- Case Statement
- Demographic Information-External Analysis
- SWOT Analysis
- Organizational Development / Analysis
- Funding history
- Funding Strategy
- Structure of the fund raising strategy

Richard Male & Associates

Sample Corporate Sponsorship Package
Mobilizing Resources for Independent living

New Orleans, LA

richard male
& associates

SAMPLE CORPORATE SPONSORSHIP PACKAGE

MOBILIZING RESOURCES FOR INDEPENDENT LIVING

New Orleans, La.

Background of Corporate Support

Corporate philanthropy has gone through many dynamic changes during the past ten years. Nationally, mergers and acquisitions have run rampant and corporate operating environments have become extremely competitive. Due to these factors, corporations are tying their community relations and philanthropy into a business and marketing strategy. Many corporations are now seeking linkages with nonprofits that can give them credibility and visibility. Corporations are also interested in involving their employees in community activities and will support organizations where their employees are involved as volunteers. Corporations are also interested in supporting nonprofit organizations that use their products or services, i.e., those who are also their customers.

While corporate funding in the United States can be complex, we will break it down into understandable parts here. Similarities exist between foundation and corporate giving. Both require initial effort on the part of the nonprofit to develop contacts and credibility. Both are maintained by ongoing public relations efforts. And both have the potential to generate large sums of money. The main difference between the two is that corporate giving is **partnership driven** while foundation giving is **relationship driven**. Corporations require a win-win strategy. You must have something that benefits the corporation if the corporation is going to benefit you—**W.I.I.F.M. (What's In It For Me)**. Corporations like to know what advantage partnering with your organization will give them. Will it increase their visibility with one of their target markets? Will they receive enough visibility through your organization to give them a good reputation in their community, in this case the nation? Will our support give us a competitive advantage with persons with disabilities? These are the kinds of questions corporate executives will ask themselves when considering a partnership with an ILC.

Advantages of corporate dollars

The fact that corporate entities have self-interest can be a distinct advantage to ILC's. Once the partnership is established and is working well there is a ***high probability*** of receiving money over long periods of time. Receiving corporate money also helps leverage other private money because new corporate dollars will follow once other corporations are on-board. Corporations are often very generous with in-kind donations such as computers, office equipment, products they manufacture, and printing of annual reports or marketing materials.

Disadvantages of corporate dollars

There are some serious disadvantages to corporate dollars. It is important to have the right "screen" to make sure the corporation fits the values, mission, and focus of the ILC so that you maintain your credibility. If the corporation is approached through the philanthropy department, the dollar amounts could be very small and not worth the time and effort. Some corporations are not responsive to new and controversial issues or tactics and may shy away from the ILC's civil rights focus.

ILC's Four-tiered Corporate Sponsorship Program

Sample packages that need to be adapted to fit your needs

Richard Male & Associates recommends approaching corporations through their ***marketing*** departments by offering a tiered corporate sponsorship program. The following is a tier sponsorship program that should prove attractive to many corporations. Obviously the dollar amounts need to be geared to your local community.. In larger urban areas, these figures may be appropriate, but in small to mid-sized cities, we would recommend starting off at $10,000, then going to $5,000 and $2,500.

When you approach a corporation with a sponsorship program you are presenting a ***business proposition*** rather than requesting a contribution. You are offering a corporation a benefit or several benefits for sponsoring your organization. The program developed by Richard Male & Associates for the ILC involves ***five*** levels of sponsorship each with its own set of "value added" benefits. The list is in descending order from largest dollar amount and largest number of services to smallest dollar amount and smallest number of services. The tier categories are named after gemstones to represent the "gems" that will be sponsoring your organization. The categories are **Diamond, Emerald, Ruby, and Sapphire.** (Note that this is only a starting point for your discussions and negotiations. Be open to other needs and suggestions the corporation may have. In some cases, you may be able to combine a sponsorship program with earned income opportunities.) It is important to emphasize that these levels **must be tailored** to the individual location and the benefits or "value added proposition".

➢ Diamond Sponsorship-$25,000 level

At this level of sponsorship the corporation obtains significant value, exposure, and access to your ILC and its membership. This sponsorship will give **one** corporation exclusivity rights; therefore, you will want to choose this sponsor carefully.

Suggestions for **ILC benefits** offered for the **Diamond Sponsorship** include:

- A constant presence on your ILC website with a link to the corporation's products and/or services along with a statement advertising the corporation's role in sponsoring the ILC
- The use of the sponsoring corporation's name and logo on all written materials (newsletters, flyers, signage, etc.), training materials and marketing materials such as totes, notepads, briefcases, etc. given to attendees at workshops and conferences throughout the year
- A full page advertisement in all of your newsletters free of charge
- One use of your mailing list with a *joint* mailing and promotional materials (approved and developed by your ILC)
- Acknowledgement of sponsorship in all your ILC newsletters and public events
- One sponsored dinner with your ILC board of directors. This will provide the Diamond Sponsor the opportunity to meet and socialize with directors of centers for independent living throughout the country.
- Media coverage of the sponsorship (this gives both the corporation and the ILC credibility and visibility)
- Verbal acknowledgement at all training sessions
- Free admission for two or three of the sponsoring corporation's employees at the ILC Annual Conference or meeting
- Invitation to provide a corporate booth at the Annual Conference free of charge
- Invitation for a corporate speaker to make a brief welcome at the Annual Conference
- At least one corporate training session on disability issues and employing people with disabilities (this provides a meeting opportunity for the ILC with corporate management)
- And assessment of physical accessibility of the main corporate headquarters building, or branch offices in your community (this provides another meeting opportunity and a chance to hear the needs of the corporation)

➢ Emerald Sponsorships-$15,000 level

At this level of sponsorship dollars given are still large so sponsoring corporations will look forward to receiving many benefits. The ILC may want to look for **two** companies who are not in competition with each other to participate at this level during the next three years. Since visibility of these corporations in partnership with your ILC will be significant, you will want to choose these as carefully as at the Diamond level.

Suggestions for **benefits** offered for the **Emerald Sponsorship** include:

- Sponsoring corporations names and logos on your ILC website six times a year with a link to corporate websites along with a statement advertising the corporation's role in sponsoring your ILC
- Use of the sponsoring corporation's name and logo on all marketing pieces, publications, training materials and workshop packets
- a half page advertisement free of charge in two of your newsletters
- one use of your mailing list with a joint mailing endorsing the corporation's products and/or services
- Media coverage of the sponsorship (this gives both the corporation and you credibility and visibility)
- Verbal acknowledgement at all training sessions
- Free admission for two or three of the sponsoring corporation's employees at your Annual Conference or other large gatherings of your people
- Invitation to provide a corporate booth at the Annual Conference (or other large meeting) free of charge
- Acknowledgement of sponsorship in all your newsletters
- Underwriting and introduction at one board of director's dinner during the year

➢ **Ruby Sponsorships-$7,500 level**

Dollars received at the Ruby level are relatively small compared to a company's overall marketing budget, but these corporate sponsors will still want value for their money. Your ILC may want to look for participation from at least **three** non-competing corporations at this level by 2004.

Suggestions for **benefits** offered **for the Ruby Sponsorship** include:

- Sponsoring corporations names and logos on your website three times a year with a link to corporate websites along with a statement advertising the corporation's role in sponsoring your ILC
- Use of the sponsoring corporation's name and logo on publications, training materials and workshop packets
- A half page advertisement free of charge in one of your newsletters
- A press release in the newspaper to announce the partnership and gift (this gives both the corporation and you credibility and visibility)
- Verbal acknowledgement at all training sessions
- Free admission for one of the sponsoring corporation's employees at the Annual Conference
- Invitation to provide a corporate booth at the Annual Conference free of charge
- Acknowledgement of sponsorship in all your newsletters

- **Sapphire Sponsorships-$2,500 level**

Sapphire Sponsors would support a specific program or project of your ILC and still provide exposure to your membership for the corporation. This could also be sponsoring a specific special event you may have during the year.

Suggestions for **benefits** offered **for the Sapphire Sponsorship** include:

- Corporate name and logo on all marketing materials going out for this program or special event.
- The corporation's name featured on your website for the event with a link to the company's website
- A quarter page advertisement free of charge in one of your newsletters
- Verbal acknowledgement by the special event leader of the corporate sponsorship
- The company logo on all materials for that program or special event
- Banner at the event or program

- **Corporate Memberships-$500**

In addition to these "gem" level sponsorships, a general corporate membership should be considered at the $500 level. Corporate membership benefits would include recognition in your marketing materials, and web pages.

Corporate Strategic Approach

There are literally hundreds of thousands of companies throughout America that would have an interest in being visible with the disability community. Clearly, banks, utilities and insurance companies are in very competitive industries that are all regulated and need to have a public presence. Other companies, such as pharmaceutical manufacturers and distributors, have a large business interest in the disability community. High tech companies, such as AT&T, Microsoft and others want to have a presence and market their products to your constituencies. Your ILC's current vendors of office supplies, assistive technology equipment, banking services and insurance products should be on the primary list.

The following **steps** should be considered when approaching corporations:

1. Inventory your board, volunteers, and other contacts to learn who knows the key people at corporations and then use these people as "door openers" to set up appointments.
2. Before the visits, research the company through reading annual reports and the business sections of newspapers, and talking with other nonprofits receiving support. Learn as much as you can about their business products, the key people, and how they want the company to be perceived in the community.

3. Form a Corporate Sponsorship Committee made up of a few board members plus business people who are friends, and develop the specific approach and "pitch." When approaching the company, try to meet with the **marketing vice-president** or above, and not with the community relations or philanthropic people. Remember that the corporation is looking for a *partnership* not a *relationship* so match their visibility and marketing needs with your financial needs.
4. If possible, try to involve an employee of the prospective corporate partner you're your ILC activities. These employees can be invaluable ambassadors and will go with you to ask for the money.

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CASE STUDY

Do Good ILC in Pleasantville, USA

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CASE STUDY

Do Good ILC in Pleasantville, USA

Introduction

The purpose of this exercise is to have the participants work in small groups to analyze a hypothetical situation and to learn and practice how to develop key elements of understanding and developing an overall fundraising plan.

When reviewing this case be sure to integrate not only the fundraising issues, but look at the leadership of the board and executive director and bring in as many of the external community factors as possible.

Situation

Do Good Independent Living Center was founded in 1979 in a Midwest City of 150,000. The ILC serves a three county area. Each one of the counties is very different from the other. One of the counties is a working class county that has two factories employing over 1,000 people each, is heavily unionized where the majority of the people are Catholic. During the past year, this county has experienced some layoff's in the factories that has impacted the small business community.

The second county is primarily agricultural that raises corn and soybeans. In addition, many people who live in this country work in the large city and commute each day 30 miles. This town has quite a few agricultural related businesses including a division of Caterpillar Tractor Company, and Pioneer Seed Company. This counties largest town has 75,000 people and is growing rapidly as a suburb where people with money can move in and have 1-acre plots of land to build their homes.

The third county has recently been transformed into an upper middle class area where a lot of the corporate and retired agricultural money live. It has lots of expensive restaurants, the Episcopal Church and the Rotary Club Play strong roles in this country. This city is the commercial and entertainment hub of the region.

This area is politically Republican and conservative and believes that everyone who is able, should work for a living. There are progressive elements in the community that are represented by the churches, unions, and some of the service clubs.

Mission

The Do Good ILC is a private nonprofit organization that is controlled and directed primarily by persons with disabilities. Of a board of directors of 15 persons, 10 are persons with disabilities, two own small businesses, one is a retired pastor of a large church and two work for government agencies.

The focus of the organization is to empower person with disabilities to advocate for themselves and to take control over their lives.

Programs

Since 1979, the ILC has provided a wide variety of services designed to empower persons with disabilities to take control over their lives and to become more independent. The ILC provides the following services to over 1,000 persons with disabilities within the three-country area:

- Skills training and peer counseling
- Employment programs and opportunities
- Advocacy and training
- Independent Living Skills
- Youth program
- Housings programs and issues
- Community organizing- developing leadership to work on issues on the local and state wide level

Staff and Board

The first 20 years of the organization was led by the founder and executive director of the organization. John Grey was a very charismatic person who both led the staff and the board. Most of the board meeting activities centered around John describing and reporting to the board all of the good things that DO GOOD ILC was providing for over 1,000 persons with disabilities yearly.

The organization hired a woman as the Executive Director two years ago. She used to be a client of the agency and started to work as a secretary 10 years ago and showed real promise. During the years, she was promoted to project director of one of the housing programs and then directed the advocacy and training efforts. The board was very proud that it hired a former recipient of the services and has been extremely supportive of her efforts.

Lillian's management style is very different from John the founder of the organization. She is very shy with the board and provides good management and support to the board, but not much leadership. Since she was raised in a background of poverty she is still a bit nervous around people with money and has been hesitant to be visible with the radio and newspapers of the community and does not feel comfortable with corporate leaders. The board has wanted her to become a member of the Chamber of Commerce and join the Rotary Club but Lillian has not joined.

Historically, the board of directors has been very active with advocacy, but not active in any other areas of the organization. One of the members described the board as "not very engaged". The board has not had to do much in the past because John made all the key decisions and was great with the media and with the corporate leaders. Lillian's style is very laid back and does not provide strong leadership to the board. Some of the board members are getting nervous because the future funding of the organization is uncertain and the economy has been poor. There is reason to believe that some of the state and federal funding may be reduced during the next three years.

Funding History

The total agency budget last year was $1,000,000 up from $900,000 in 2001. The ILC receives funding through a variety of federal and state grants through the SILC and other agencies. Just during the past few years, they have started to receive small amounts of funding (under $25,000) through the counties from Community Development Block Grants. Approximately 90+% of the organizations budget comes from public funding sources. The rest of the money comes from corporate donations that average about $2,000 from Wall Mart, K-Mart, First City Bank, First United Methodist Church and a few other miscellaneous sources. On a yearly basis the organization has an annual dinner that attracts 500 people from the area. During the past year, they started to approach corporations to underwrite the event and this event raised $75,000 this past year, up from $25,000 in previous years.

During the past few years, the tri-county area has formed a community foundation, and two years ago a hospital was sold and now there is a health care foundation for the area. The religious community has never been strategically approached for money, even though they historically have supported soup kitchens and food banks at their churches. A significant number of the constituents of the ILC attend churches throughout the area. Some of the restaurants and hotel in the wealthier parts of the region have made donations of surplus foods to other nonprofits, and the ILC has never approached these for support. Recently, some of the board members went to a French restaurant and the owner is a person with a disability who expressed real interest in the organization.

The organization has been notified by one of the public funding agencies that during the next three years, they will lose almost $200,000 of their funding and has encouraged all the ILCs in the state to diversify and broaden their funding base or else they will have to lay off staff and eliminate programs.

Assignment:

Please work in groups to develop an overall fundraising plan for the short term (12 months) and then look beyond that into the next three years. Consider the following questions:

- Who are the significant stakeholders in the organization and how can you involve them in raising new money
- Identify key funding sources and discuss the strategic approaches for each source during the next 12 months
- Develop funding goals for different sources (government, foundation, corporation, special event, earned-income, religious, union, etc) during the next three years in order to make up for the shortfall.
- What approaches could be used to motivate the board and director to "position" the organization better? What groups and organizations should the ILC become more involved with and why?
- How would you integrate marketing and public relations strategies in an overall fundraising plan
- Who would you add to the board to assist with the fund raising? Would you add a resource development committee where you could recruit more 'high powered' persons?

IL NET TRAINING PROJECT

MOBILIZING RESOURCES FOR INDEPENDENT LIVING

August 5-7, 2002

Seminar Evaluation Form

WE VALUE YOUR OPINION! We review every evaluation form. Please give us your feedback about today's program by completing this form and turning it in before you leave (or mail it back to NCIL, Att: Toony Buppapong, 1916 Wilson Blvd., Ste. 209, Arlington, VA 22201).

	Not at all		Average		Excellent
Was the seminar content:					
Organized?	1	2	3	4	5
Interesting?	1	2	3	4	5
Useful?	1	2	3	4	5
What you hoped it would be?	1	2	3	4	5
Overall content rating	1	2	3	4	5
Did the trainers know the subject?					
Richard Male	1	2	3	4	5
Lee Schulz	1	2	3	4	5
Did the trainers hold your attention?					
Richard Male	1	2	3	4	5
Lee Schulz	1	2	3	4	5
Did the trainers use relevant examples?					
Richard Male	1	2	3	4	5
Lee Schulz	1	2	3	4	5

Overall trainer rating	Low				High
Richard Male	1	2	3	4	5
Lee Schulz	1	2	3	4	5
How likely is it that you will use what you learned at this training?	1	2	3	4	5
Overall training conference rating	1	2	3	4	5

How well did this training develop your skills and knowledge for...

	Low				High
1. capitalizing on current funding trends among private foundations, corporations government, religious funders, philanthropic trusts, and individuals?	1	2	3	4	5
2. identifying fundraising approaches compatible with your organization and local situation?	1	2	3	4	5
3. establishing relationships with funders before asking for money?	1	2	3	4	5
4. asking for money in ways that make clear who you are and what you would use the funding for?	1	2	3	4	5
5. staying true to the IL mission and philosophy while fostering growth?	1	2	3	4	5

Please list 2 or 3 of the most important things you learned from this training.

What else do you wish you would have learned at this training?

What do you wish the training had spent more time on?

What do you wish the training had spent less time on?

What might prevent you from using the information back on the job?

What would you like to see IL NET do as an on-site training?

What would you like to see IL NET do as a teleconference?

Please make any additional comments you think might be helpful to us:

THANK YOU FOR THE GIFT OF YOUR TIME

IL Net Presents

Mobilizing Resources for Independent Living

August 5-7, 2002

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